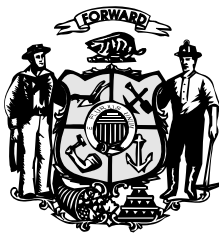


STATE OF WISCONSIN
Public Records Board

SCOTT WALKER
GOVERNOR

Matthew Blessing
Board Chair



4622 University Ave., 10A
Madison, WI 53702

Telephone 608 / 266-2770

December 17, 2012

To All Agency Heads:

This communiqué is being sent to you as a brief summary of several important actions taken during FY12 and early FY13 by the Public Records Board (PRB).

The PRB has seen some changes in board membership during FY12 & FY13. Most notably, long-time board member and past Chair, Peter Gottlieb, retired. I have since taken his former position at the State Historical Society (SHS), as well as been appointed as Designee of the Director of the SHS to the PRB. Subsequently, I was elected as the Board Chair.

There are also several other new member appointees to the Board. Mary Burke is the new Designee of the Attorney General's Office; Sandra Broady-Rudd, CRM, ERM, is the new Designee of the Governor; Scott Kowalski is the new Small Business Designee; Carl Buesing is the new Local Government Designee of the Governor; Peter Sorce is the Other Designee of the Governor; and Bryan Naab continues to be the Designee of the State Auditor.

The PRB and its committees have been very active this past year. Extensive work has been completed with some of the statewide General Schedules. There have been revisions to the **Administrative Records; Fiscal and Accounting and Related; Human Resources and Related; Payroll and Related** and the **IT Business Records General Schedules**. More extensively, the **Budget and Related General Schedule** was totally rewritten. I would recommend that all of these be reviewed by your senior management as well as those key individuals in the respective areas of impact.

All the general schedules developed and approved by the PRB, as well as the [Notifications of Adoption \(OIOO\) form](http://publicrecordsboard.wi.gov/Docs_by_cat_type.asp?doccatid=678&locid=165) and instructions can be found at: http://publicrecordsboard.wi.gov/Docs_by_cat_type.asp?doccatid=678&locid=165.

In addition, the PRB developed and approved two new guidance pieces of note; "[Use of Contractors for Records Management Services](#)" and its sister document, "[Guidance on the Use of Contractors for Records Management Services in Cloud Computing Environments](#)". These should be found especially useful, given the current climate in the IT arena.

As noted in my memo from March of this year, there was a significant and important change to the General Schedule Notification of Adoption (Opt In Opt Out) policy. In short, upon PRB approval of a General Records Schedule (GRS), the implementation of said schedules by Wisconsin state agencies will be mandatory and immediate. Implementation of a PRB-commissioned GRS by the UW System Administration and all UW campuses will be optional but recommended. This policy is in accordance with the authority outlined under s.16.61, Wisconsin Statutes.

With the exceptions noted above, all state agencies are bound by this policy. Agencies may choose to Opt Out of a GRS, in whole or in part; however, in order to Opt Out in whole or in part, an agency must develop corresponding retention schedules of their own within 12 months from the date of the GRS approval, citing the business need for the unique requirement. During that time and until their replacement retention schedules have been approved by the PRB, the agency will be bound by the GRS.

If you have any other questions regarding this process, you can contact the PRB Executive Secretary, Harold Coltharp at 608-266-2770, or Harold.coltharp@wisconsin.gov.

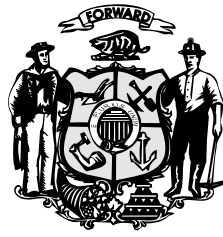
Sincerely
Matt Blessing
Designee of Director of Wisconsin Historical Society
Chair Public Records Board

cc: Agency Records Officer

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